

## SmartStream Coordination Meeting Minutes

### August 3, 2006

Attendance: Pete Bostian, Ken Dinsmore, Ed Green, Kathy Hoffman, Mel Lambert, Cathy McClintock, Mark Testerman, Karen Toms

1. SmartStream Version 7.0 Status: Pete stated that the rerun of the 7.0 migration (actually upgrade-in-place) from production to test worked ok. Even though we did not do the archive tables this time the process took longer than expected (> 12 hours). The production migration will be done on the new computer and should be much faster. A service pack (7.00.01) for SmartStream 7.0 was recently released. There appears to be no significant changes – cleaning up some file open queries and other minor bug fixes/changes and screen changes to include their new Extensity logo. Pete noted that we did not upgrade production to 7.0 in July as intended because we could not get the automated client update for Sybase to work. So far we have had no luck getting help from the client update software (Marimba) vendor (BMC). We have to get the client update issue resolved prior to placing 7.0 (or 7.0.01) into production.
2. P-Card System: All credit card holders are now using the new VISA cards as of July 6<sup>th</sup> and the transition as far as the P-Card system went smoothly. We are having problems with the bank's data transfer program. We receive the daily activity but the files are not deleted from the bank's queue so they are repeatedly downloaded each day. Pete noted that the format of the new files permits more extensive item descriptions than the old format if the vendor provides the information to VISA.
3. Employee Reimbursements through Payroll: Sophia was not present for the update; however, Mel reported she had entered some employee invoices so they can be processed through the payables system. Kathy stated that the goal is to have the procedure ready for production by the first of the contract year.
4. SmartStream ID's: Pete noted that in all the new systems, the user ID is composed of the employee's company ID and employee number. He is considering using that format for new SmartStream users. The current 3-character ID's were originally required by the Army and as a result we used that format for our systems so the user would not have to remember several user IDs. Now with all new systems operating locally, there is no reason to continue to use the 3-character ID format. Pete indicated there were issues with the employee number ID which Mel recently brought up at the Maximo meeting - users are currently using their 3-character ID, the date and a sequence number to identify blanket releases. Since this is a 12-character field, continuing this format with a 7-character company-employee number ID is not possible. Further discussion followed regarding the future possible re-assignment of user ID's. Mel said she will look into the Next Available Number option to see what may be possible for unique automated numbering.
5. Maximo Status: Pete discussed the status of the Maximo implementation regarding SmartStream. Up until yesterday, PR's that would require SmartStream purchase orders were going to be extracted from Maximo and be loaded into SmartStream. Everything else regarding purchasing activity for Maximo-related information would be extracted from SmartStream (and Pcard) and be loaded into Maximo. Now it appears that Maximo generated PR's will not have to be loaded into SmartStream because selecting the appropriate PR's from Maximo would be very difficult and a Maximo work-around has been found. Selected Maximo-generated journals will have to be loaded into the SmartStream ledger to reflect shared service work order charges and supply warehouse issues. Pete would like a method to identify Maximo-related SmartStream purchase orders at a high level (in the PO data for instance) because selecting them based on center numbers involves joining many tables.

6. Miscellaneous: Mel questioned Pete about the possibility of creating an end-user Web reports menu activity so that the users do not have to search for the SmartStream activity that contains the report they want to run; much like the one used by ALS. Pete indicated that it is easy to make a menu and we only need to know which reports to include. He noted that most likely a new SmartStream activity would be created for the consolidated menu and that eventually the individual report activities would be deleted except for those most used such as the PR to PO inquiry. Mel said she would provide a list.

Pete reviewed log in and password procedures with Kathy Hoffman for access to all job-related activities formerly organized under Cheryl's ID.

7. The next meeting will be held September 6, 2006, at 9 AM in the Building 244 Conference Room.